ISG Provider Lens™

Future of Work (Workplace) - Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of: unisys

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Table of Contents

Executive Summary 03

Provider Positioning 06

Introduction

Definition 10
Scope of Report 12
Provider Classifications 13

Appendix

Methodology & Team 41
Author & Editor Biographies 42
About Our Company & Research 44

Employee Experience (EX) Transformation Services 14 – 20

Who Should Read This Section 15
Quadrant 16
Definition & Eligibility Criteria 17
Observations 18
Provider Profile 20

Managed Workplace Services – End-user Technology - Large Accounts 21 – 27

Who Should Read This Section 22
Quadrant 23
Definition & Eligibility Criteria 24
Observations 25
Provider Profile 27

Managed Workplace Services – End-user Technology - Mid Market 28 – 32

Who Should Read This Section 29
Quadrant 30
Definition & Eligibility Criteria 31
Observations 32

Digital Service Desk and Workplace Support Services 33 – 39

Who Should Read This Section 34
Quadrant 35
Definition & Eligibility Criteria 36
Observations 37
Provider Profile 39

Report Author: Kevin Turner

ITSM revolutionised IT support demands in the'90s, and 2023 is the year of the EX workplace revolution

In recent years, we have observed an increasing trend for workplace transformation across the Future of Work and workplace technology services and solutions market studies. This year is no exception to the pattern, and we noted two further significant developments in the first half. First, a sharp economic slowdown has been accelerating globally, impacting everybody, including large enterprises struggling to identify the necessary budgets for continuous technology investments. Second, there has been a proliferation of products and launches based on AI technology. These developments largely influence enterprise workplace technology buying decisions, combined with the trends we observed last year, namely the widespread adoption of hybrid working and increased focus on sustainability and a tech-savvy workforce.

Delivery of effective hybrid working models

Hybrid working models have become the norm across much of the U.K.. More than half of the latest job adverts state either a minimum or often maximum number of days in the office, reflecting the demand being generated by workers as they look for like-minded employers. Enterprises must find the guardrails to enable hybrid working, which requires a balance of corporate policies, workloads appropriate for remote delivery and technical infrastructure and tools to enable seamless access to applications, data and people regardless of work location or device.

The technical elements can be solved largely by unified communication and collaboration as a service (UCaaS) platforms such as Microsoft Teams, but many enterprise employees have yet to see Microsoft Teams as much more than a replacement for Skype for Business. These UCaaS platforms are rich in features and capabilities, but corporates deploy them en masse as a point solution to upgrade or replace legacy tools. Smart enterprises are exploring the breadth and depth of these

Business collaboration with enterprise clients is key to successful workplace transformation.

platforms to improve delivery in the workforce (including internal employees, third parties and partners).

With the rapid technological advancements, the dark days of M&A that left workers in growing companies only able to collaborate via email attachments, USB keys or some external and non-approved channels such as WhatsApp need to be assigned to the history books.

Key providers we have categorised as Leaders or even Product Challengers have the knowledge, skills and techniques to work with enterprise clients and enable every enterprise to provide a great hybrid working experience.

Workplace technology is bigger than IT alone

Over the last five years or so, in the U.K., we have seen technology adoption move out of the shadows of IT and into the boardroom. With IT regarded as a cost centre earlier, it has evolved to become a business enabler, heading towards a potential profit centre — although for many enterprises, that may still be a distant dream.

Currently, enterprises across the U.K. increasingly understand the significance of collaboration and that IT, HR and facilities functions can no longer solve the business challenges alone. Although a few enterprises had noted this before COVID-19, since the pandemic outbreak, almost every enterprise has begun to focus more on collaboration and closer alignment to find individual solutions that work readily for all three business functions and other core areas.

The motivation for these business functions to collaborate includes the potential overhead reductions in software, hardware, operational and governance resources. They are often significant, with the potential to raise the ROI profile to levels that are challenging to attain in isolation. However, the bigger prize comes in the shape of employee experience (EX), with complex requests or processes being simplified to a level where everything from employee onboarding through to daily tasks or work assignments, meeting room availability and more are made to deliver results for the workforce with minimum fuss and friction.

Workforce engagement and adoption

EX management is a concept and philosophy which early adopters became aware of in 2018. Back then, few enterprises had awareness or interest in holistic programs to improve or enrich EX — the focus was mainly on device, application or network availability, as emerging technology from digital EX (DEX) vendors sought to identify and address underlying and hidden technical issues.

In 2023, we have seen a dramatic increase in the relevance and importance of EX — with every provider included in this year's Future of Work study having identified some form of experience management. At the simplest level, this tends to be the deployment of DEX tooling with some remediation or corrective actions across endpoint devices. The leading experience management provider delivery we observe includes a more holistic management layer that provides oversight and evaluation across inter-dependent towers, even identifying and resolving employee issues that are not purely technical.

Another key benefit of an EX management focus, apart from a happier and more productive workforce, is that identifying friction points or challenges for digital transformation initiatives empowers a much greater adoption of technology investments by the workforce. When costs are under scrutiny, technology expenditure that does not deliver on its promise can be closed down easily. Therefore, anything that helps make employee adoption more comprehensive has to be a valuable asset.

Generative AI empowers new ways of working

Generative AI is not nearly as new as it would appear at first glance. After invention in the 1960s, the initial technology deployments seen by most of us were in 2014, and until this year, progress was maybe steady at best. Still, since the start of 2023, we have seen an explosion in capability and alternatives, leading to much faster development and even greater ideas and possibilities for use cases.

In this year's Future of Work study, we have heard from all providers regarding their generative AI and large language model (LLM) developments, specific use cases for deploying features to clients and, even more exciting, where they see the evolution across the next 12–24 months.

Upcoming product launches such as Microsoft 365 Copilot are set to generate new use cases and scenarios across the IT landscape as the workforce finds smarter ways to interact with technology. Leading providers are preparing capabilities to offer to clients in anticipation of the demand, and maintain a semblance of governance to the IT environment through guardrails and methods to prevent corporate technology from becoming a free for all.

Leading providers are actively building enablement and support scenarios to exploit the power of generative AI, driving agility, flexibility and scalability to levels that enterprises have aspired for many years but will achieve during the next 12–18 months.

Budget constraints

The continuing global economic pressures and the geopolitical uncertainty across Europe have contributed to budget concerns not witnessed since the 2009 stock market crash. The increased expenditure on energy supplies has contributed to a significant rise in global inflation rates, and the U.K. is no exception. As a result, the market stability in the region is further hampered by more than 12 months of workforce unrest, seeing widespread strike action for pay and working condition changes.

These factors have made technology investments and innovation more critical than in previous years, with enterprise clients scrutinizing the projected returns before committing to transformation projects. The leading providers in the IPL Future of Work report have successfully delivered transformation initiatives, especially when linked to EX, as reported in the EX Transformation Services quadrant analysis. Providers can generate positive results for enterprises and employees while maintaining cost control, which can even result in some of these innovations becoming self-funding, delighting the procurement teams.

U.K. clients are leading providers' demands for increased user productivity, measured sustainability initiatives and a track record of EX focus across all digital workplace services. Digital workplace transformation is a continuous journey and not a destination.

Provider Positioning

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology - Large Accounts	Managed Workplace Services – End-user Technology - Mid Market	Digital Service Desk and Workplace Support Services
Accenture	Leader	Leader	Not In	Leader
Atos	Leader	Product Challenger	Not In	Leader
Birlasoft	Contender	Contender	Not In	Not In
Capgemini	Leader	Leader	Not In	Leader
Capita	Not In	Not In	Leader	Not In
CGI	Not In	Not In	Leader	Not In
Claranet	Not In	Not In	Not In	Contender
Coforge	Not In	Contender	Not In	Not In
Cognizant	Not In	Product Challenger	Not In	Product Challenger
Computacenter	Market Challenger	Leader	Not In	Leader

Provider Positioning

Page 2 of 4

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology - Large Accounts	Managed Workplace Services – End-user Technology - Mid Market	Digital Service Desk and Workplace Support Services
Digital Workplace Group	Not In	Not In	Not In	Contender
DXC Technology	Leader	Leader	Not In	Leader
Fujitsu	Leader	Leader	Not In	Leader
GAVS	Not In	Contender	Contender	Not In
Getronics	Market Challenger	Product Challenger	Leader	Product Challenger
HCLTech	Leader	Leader	Not In	Leader
Hexaware	Product Challenger	Product Challenger	Leader	Not In
Infosys	Leader	Leader	Not In	Leader
Kyndryl	Not In	Product Challenger	Not In	Product Challenger
LTIMindtree	Product Challenger	Product Challenger	Not In	Product Challenger

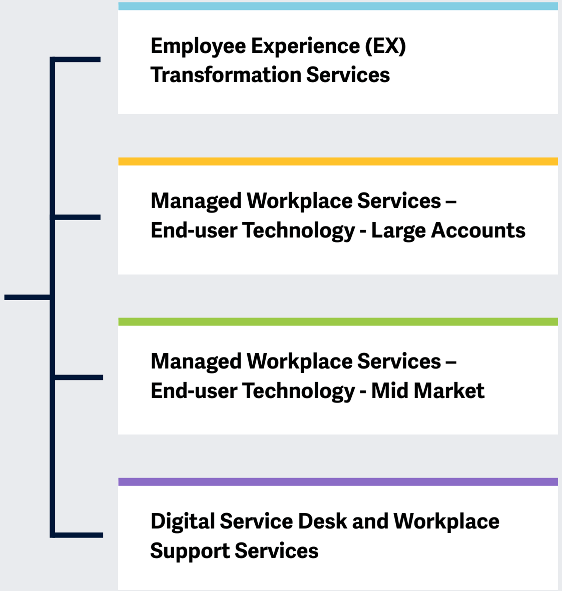
Provider Positioning

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology - Large Accounts	Managed Workplace Services – End-user Technology - Mid Market	Digital Service Desk and Workplace Support Services
Microland	Product Challenger	Rising Star ★	Not In	Market Challenger
Movate	Product Challenger	Market Challenger	Market Challenger	Not In
Mphasis	Not In	Product Challenger	Product Challenger	Not In
NTT DATA	Not In	Market Challenger	Not In	Rising Star ★
Orange Business	Not In	Product Challenger	Not In	Product Challenger
Sopra Steria	Not In	Not In	Product Challenger	Not In
SS&C	Not In	Contender	Not In	Not In
Stefanini	Rising Star ★	Not In	Not In	Not In
TCS	Leader	Leader	Not In	Leader
Tech Mahindra	Contender	Product Challenger	Not In	Product Challenger

Provider Positioning

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology - Large Accounts	Managed Workplace Services – End-user Technology - Mid Market	Digital Service Desk and Workplace Support Services
TET	Not In	Not In	Contender	Not In
Trianz	Not In	Not In	Not In	Contender
Unisys	Leader	Leader	Not In	Leader
UST	Contender	Contender	Rising Star ★	Market Challenger
Vodafone	Not In	Contender	Contender	Not In
Wipro	Leader	Leader	Not In	Leader
XMA	Not In	Not In	Contender	Not In
Yash Technologies	Not In	Not In	Not In	Contender
Zensar Technologies	Contender	Product Challenger	Not In	Leader

This study evaluates **MSPs' capabilities** around the key **Future of Work services** across different regions.



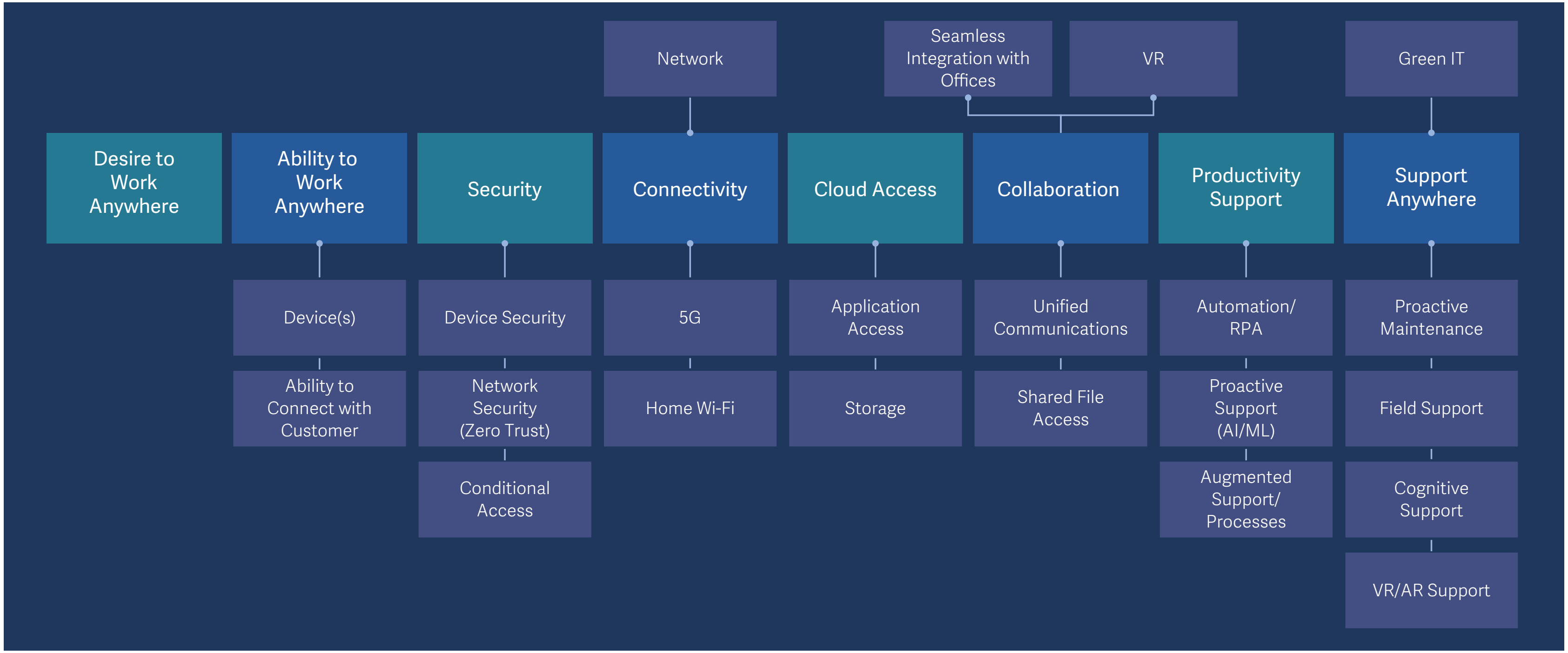
Simplified Illustration; Source: ISG 2023

Definition

From the future of work perspective, 2023 will be a year of stabilization. After the disruptions and challenges posed by the pandemic and the "Great Resignation" that followed, global businesses have started adjusting to new realities and acknowledging the importance of employee experience. EX transformation is now every business leader's priority, along with adapting to changing customer demands, evolving technologies and becoming more conscientious and environmentally focused. According to the new Future of Work technology landscape, technologies that support work from anywhere are only one of the components as shown in Figure 1. While other ISG Provider Lens research covers the topics of connectivity and security, this research focuses on all the other aspects of the landscape.

The Future of Work services landscape becomes wider as enterprises need assistance implementing and supporting an EX-centric technology model. As new decision makers get involved in tech investments that enable and engage with employees, clients must analyse the capabilities offered by different service providers in underlying technology enablement and maintenance, workplace tech support and overall experience transformation. As organizations take a holistic approach to EX transformation, strategy and consulting become an integral part of the approach. Hence, ISG has decided to merge this area with other services covered in the research this year. Another accompanying research study on technology providers will cover the solutions part for these services.

Figure: Key Components of the Future of Work Technology Landscape



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four quadrants for services/solutions: Employee Experience (EX) Transformation Services, Managed Workplace Services – End-user Technology – Large Accounts and Managed Workplace Services – End User Technology – Midmarket and Digital Service Desk and Workplace Support Services.

This ISG Provider Lens™ study offers IT decision-makers with:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Employee Experience (EX) Transformation Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.K. for evaluating the providers of employee experience (EX) transformation services.

In this quadrant, ISG highlights the current market positioning of EX transformation service providers in the U.K. and how each provider addresses the key challenges faced in the region.

Employees today expect frictionless digital experiences, so ISG sees employee resilience as one of the priorities for enterprises in the U.K.. Enterprises in this region want to unleash the potential of their employees by shaping the culture of collaboration and providing them with quality, seamless experiences. Thus, they focus on business-led workplace transformation strategies for creating a flexible and collaborative workspace. These enterprises seek to shift from an SLA-based approach to an experience measurement approach, pushing towards contractual XLAs. Client enterprises also want to engage with providers that offer experience-centric services portfolios focusing on UX and CX.

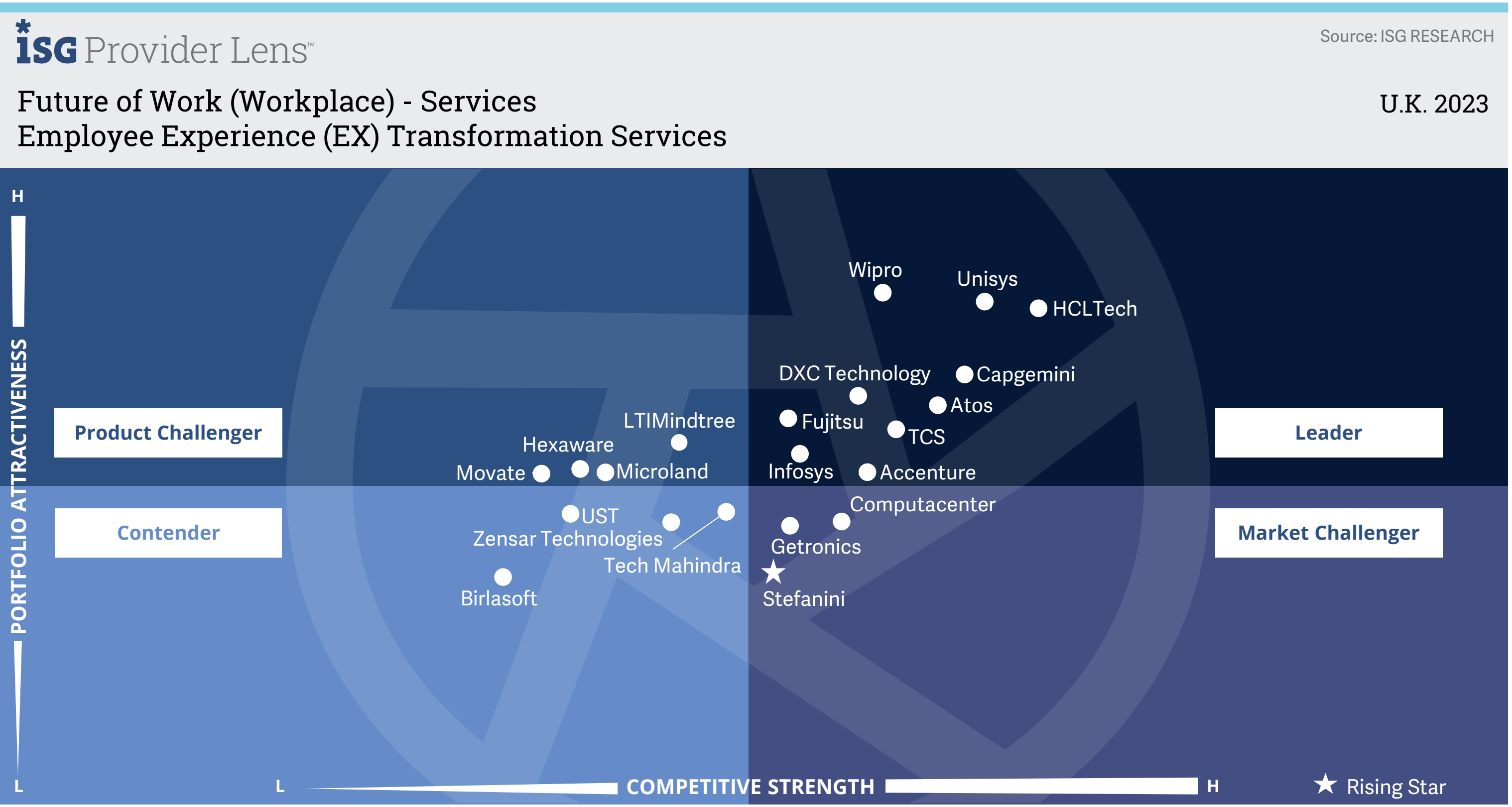
There is a lot of focus on training and upskilling employees, and enterprises here want to close the employee skills gap through continuous learning and developing digital content and effective learning methods. Enterprises seek providers that offer immersive workforce experiences to facilitate training in a safe environment. Sustainability and environmental, social and governance (ESG) are other areas of transformational focus for enterprises in the U.K. region.

CXO leaders should read this report to know about the leading providers that can help them better prepare workforces for the changing business models and dynamics in the post-pandemic world.

Digital professionals, including digital transformation leaders, should read this report to understand how EX transformation services providers fit their digital transformation initiatives.

CHRO leaders should read this report to know which providers address employee empathy and well-being in this new age of hybrid working.

Technology professionals, including workplace technology leaders, should read this report to understand providers' positioning and capabilities that can help them enhance employee services.



This quadrant assesses providers that deliver EX services. Providers support large enterprises with **experience management** skills, analytics and insights to provide business users with the **best possible workplace** experience.

Kevin Turner

Definition

This quadrant assesses providers that offer value-added managed services, not only for enabling the workplace technology ecosystem but also for enhancing end-user experience. These providers typically deal with business leaders, line-of-business (LoB) representatives and chief information officers (CIOs). They offer services that associate EX with measurable business results and help align the digital and physical facets of the future workplace with the human aspects. As global organizations realise the increasing importance of managing and enhancing EX, they partner with service providers offering EX transformation services that leverage workplace technologies. EX transformation goes beyond technology enablement and includes professional services promoting and enhancing technology adoption. Service providers providing EX transformation services engage with their clients in an outcome-focused model and follow an XLA approach.

These models leverage the analytics and data from workplace technology usage and technologies such as digital EX (DEX) to collect information and focus on actionable insights. The use of collaboration and productivity solution stack highly influences EX transformation. Support services covering modern workplace and team collaboration, audio/video conferencing, unified communication and collaboration (UCC) and productivity applications are key to EX transformation. EX transformation also extends to services supporting return-to-office initiatives with a smart campus and intelligent physical workspace while focusing on environmental, social and governance (ESG) initiatives.

Eligibility Criteria

1. Ability to **define and visualize EX transformation** models with technology transformation, technology adoption and organizational change/behaviour management services, employee engagement, productivity and associating CX with EX
2. Address **employee empathy and well-being**
3. Have considerable percent clients **leveraging XLAs** in the respective geography
4. **Support UCC, productivity stack and extend smart workplace services** to other business functions such as HRO and operations
5. Offer **smart facilities and physical on-premises services** that support intuitive capabilities such as hot desking, health assessment and a customized and contextualized experience with smart device-supported workplace
6. Have **strong local presence** and partnerships

Observations

This quadrant reflects the latest market developments in digital transformation, where clients and providers realise it is no longer enough to deliver digital transformation without connection or application to a business outcome. EX is the business outcome sought by enterprise clients in the Future of Work sector. Therefore ISG has carved out this quadrant to differentiate providers offering value-added services on top of digital transformation capabilities.

Providers in this space strongly focus on EX and other services that are weaved around experience. Technologies and methods are developing rapidly, with market positions changing accordingly.

Providers positioned as Contenders offer basic EX services powered by automation and analytics. They should further develop their capabilities to provide hyperpersonalised capabilities and establish their market presence in terms of experience.

Product Challengers in this quadrant have comprehensive capabilities covering EX through technology performance, physical workplace and enterprise application integration.

Market Challengers are well-established providers in the EX space. In the Future of Work model, they should also showcase specific capabilities in enabling experience for specific areas.

Leaders in this space have differentiated themselves from regular managed service providers with their experience-enhancing services and conducting actual client implementations.

From the 40 companies assessed for this study, 21 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Accenture's EX transformation services include a proven methodology and tools to provide clients with the benefits expected from a transformational approach. Experience analytics and citizen developer services are key differentiators.

Atos' EX transformation services are underpinned by an end-to-end experience platform fully integrated with proven technologies. They are prototyping, building and piloting early solutions for generative AI to increase the scale and capacity of the services.

Capgemini delivers EX transformation services supported by its establishment of an experience management office. This office consists of a global team comprising approximately 100 experts with diverse domain knowledge.

Fujitsu's managed workplace services capabilities in the UK are excellent, and the company has been a proven provider for many years. It has continued to improve its managed services portfolio and drives towards the modern workplace demanded by clients for hybrid working.

DXC Technology delivers EX transformation services, including Experience Cube, which allows the company to collect live operational data through service interactions and categorises them as experience, technology and operational data.

HCLTech is a leader in EX transformation services for the U.K.. It provides a range of comprehensive capabilities to move the modern workforce towards zero-touch IT operations — driving experience improvements and cost reductions.

Infosys offers a human-centric approach to EX transformation services with strong consulting capabilities, making it a leading provider in the U.K.. EX transformation moves beyond IT, supporting clients with areas such as HR and facilities.

TCS's EX transformation services are based on its IP and consulting services to establish journey maps and detailed experience expectations. The managed delivery services can be designed to deliver the required user improvement.

Unisys is an early adopter of digital experience monitoring tools and delivers EX transformation services for U.K.-based clients, covering diverse business functions and global operations. Unisys offers next-generation XLAs, which are holistic measurements.

Wipro provides EX transformation services through a comprehensive portfolio of IP and extensive consulting knowledge.

Stefanini, a Rising Star in the U.K., has a global footprint for delivering EX transformation services. It supports over 2.5 million users worldwide, including the U.K.. The company acquired 30 new clients in 2022.

Leader

> "Unisys EX transformation services focus on delivering market-leading employee engagement and productivity across IT and business functions."
>
> *Kevin Turner*

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees across 71 global offices. In FY22 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys has grown U.K. EX transformation clients by 31 percent in the last year, delivering EX transformation to household brand names with diverse and challenging requirements. Expected revenue growth in the coming year is approximately 10 percent, with further reductions in workforce headcount as automation expands.

Strengths

Data-driven digital workplace: Unisys' EX transformation services focus on aligning employee experiences with business goals. The company offers predictive insights through its PowerSuite™ platform and delivers real-time insights to improve EX further. EX metrics are collected across various tools, including UCC, user profile data and endpoint telemetry.

XLA 2.0: The Unisys XLA 2.0 approach differentiates the EX transformation offering as the focus moves from the device to the employee. The first wave of XLA 2.0 includes measuring parameters including precognition, device responsiveness, device stability, device performance, tech adoption (notably chatbot usage), Microsoft Teams responsiveness and UCaaS usage. Unisys is also planning for a second wave of measures for XLA 2.0, focusing on HR and business initiatives and outcomes.

Unisys InteliServe™: It is part of the digital workplace services suite that transforms traditional service desks into automated and intelligent ones. InteliServe™ aligns with modern workplace needs and helps clients provide users with a secure, simplified and personalised way to access support services. This approach leads to increased adoption of digital support channels, with clients taking advantage of less than 5 percent of human or voice channel contacts.

Caution

Unisys continues to showcase market-defining thought leadership on experience transformation services. It needs to increase the profit and risk-sharing delivery model, supported by XLAs, to maintain its market position in the U.K..

Managed Workplace Services – End-user Technology - Large Accounts

Who Should Read This Section

This report is relevant to large enterprises across industries in the U.K. for evaluating providers of managed workplace services — end-user technology.

In this quadrant, ISG highlights the current market positioning of the providers of managed workplace services to large accounts in the U.K. and how each provider addresses the key challenges faced in the region.

The market uncertainty and ever-changing workplace landscape in the U.K. have made it challenging and complicated for enterprises to provide consistent end-user experiences. Thus, U.K. enterprises emphasise XLAs with end-user-focused services and measurable KPIs. Enterprises in this region want to reduce the complexity of digital transformation and seek providers with a strong foundation and comprehensive portfolio for the modern digital workplace. These enterprises focus on holistic digital workplace strategy and persona-based services, emphasising providers that offer customised digital workplace services for different verticals. Enterprises in this region also want to ensure workplace security and look for providers that offer Zero Trust Security Framework and modern device management services with enhanced endpoint security controls.

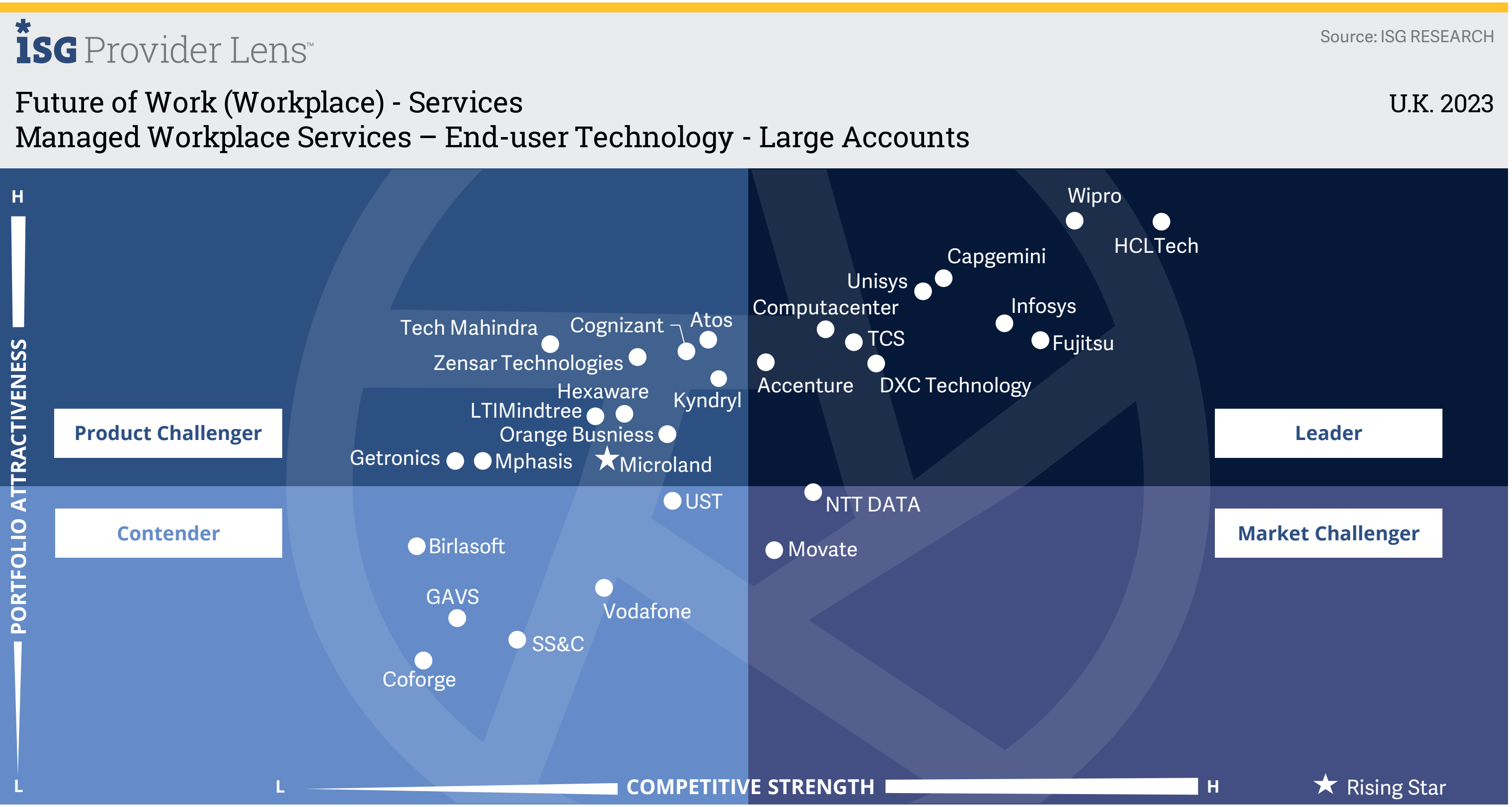
Today, millennials and Generation Z are the largest workforce components in most enterprises. This is leading large U.K. enterprises to understand their workforce better and reimagine their digital workplace strategies. These enterprises want to engage with providers offering comprehensive end-user technology services including desktop as a service, support for BYOD and proactive experience management.

Technology professionals should read this report to understand providers' relative positioning and abilities that can help them effectively plan and select managed digital workplace services.

Cybersecurity professionals should read this report to see how providers address the significant challenges of compliance and security while maintaining a seamless EX.

Procurement professionals should read this report to understand better the current landscape of managed workplace service providers in the U.K..

Digital professionals, including facility management leaders, should read this report to understand how managed workplace service providers fit their digital transformation initiatives.



This quadrant assesses providers that deliver managed workplace services. Providers support large enterprises in **end-user technology** aspects of the digital workplace to provide business users with the **modern, hybrid workplace** demanded.

Kevin Turner

Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies that are typically deployed, provisioned and secured by enterprise IT departments for end users and employees. These managed infrastructure services in the digital workplace include end-user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in the managed services space offer complete end-user computing (EUC) technology services that form the core of the digital workplace. These include device management, patch management, device and application provisioning, virtualized desktops access, device lifecycle management, support for bring-your-own-device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and managing the entire IT infrastructure behind an EX-centric workplace design. Provisioning, managing and securing the devices remain the first basic step to enabling a digital workplace and enhancing EX.

The increasing focus on EX is transforming these services to be more focused on enhancing the experience and catering to the client's respective industry. While these services are typically associated with traditional computing devices and tablets, their scope can be extended to include some industry-specific devices such as point-of-sale devices for retail and medical equipment devices for healthcare.

Eligibility Criteria

1. Provide **support for** unified endpoint management **(UEM) and mobility management**. Also, support application provisioning, patch management and enterprise mobility management
2. Provide complete **device lifecycle management services**, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling **(device-as-a-service)**. Services should cover device sourcing and logistics and Device as a Service for security
3. Demonstrate experience in providing **remote virtual desktop services** on-premises and on the cloud **(desktop-as-a-service)**
4. **Manage devices in the respective countries** in the study, with at least 25 percent of the devices managed outside the provider's home region
5. **Strong local presence** with a majority of workplace engagements around **EUC services**

Observations

This year, the Managed Workplace Services quadrant focuses on end-user technologies, with service desk and support forming a separate quadrant to provide a more granular market assessment. Providers offering a complete device lifecycle management portfolio are positioned in this quadrant, which includes all devices, physical, virtual, mobile, company-owned and BYOD, along with all aspects of enablement and provision through the entire lifecycle.

Contenders in this quadrant offer a strong managed services portfolio around the end-user technology ecosystem. They should develop further automation and integration capabilities while showcasing a better market presence with client stories and revenue.

Product Challengers have a stronger portfolio leveraging aspects of modern device management, such as automation, AI and ML technologies, and AR and VR capabilities. These providers also have frameworks and platforms for enablement of managed services and offer device lifecycle management services. They should pursue the U.K. market with consumer-like capabilities in order to acquire more clients and expand their local presence.

Market Challengers offer traditional workplace support and service desk services, and they are well established in the market with large client bases. They should continue to develop modern capabilities, AI and ML technology focussed, as U.K. clients seek scalable and flexible solutions.

Leaders in this quadrant provide differentiated workplace services powered by contextual AI technologies and further integration with business functions. Leaders deliver workplace services as cohesive and integrated solutions to drive enterprise EX for clients. They also have strong and growing client bases in the U.K..

From the 40 companies assessed for this study, 30 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture delivers managed workplace services to meet the demand for rethinking device lifecycle management and has built a practice around device as a service across workstations, laptops and mobile devices.

Capgemini

Capgemini offers managed workplace services to drive a frictionless EX for users and clients, enabling enterprises to operate smoothly. The value realization with Capgemini has translated to strong growth in the U.K.

Computacenter

Computacenter is a reputable brand in the U.K. and provides clients with robust managed workplace services across the region. It creates value for clients through automation and analytics solutions as components of its Digital Me™ platform.

DXC TECHNOLOGY

DXC Technology delivers managed EX services, a proven methodology and tools and its UPtime™ platform to provide clients with the benefits expected from a transformational approach. Its services are suited to the hybrid mode of work.

Fujitsu uvance

Fujitsu's managed workplace services capabilities in the U.K. are excellent, and the company has been a proven provider for many years. It has continued to improve its managed services portfolio and drives towards the modern workplace demanded by clients for hybrid working.

HCLTech

HCLTech delivers leading managed workplace services through a platform called Fluid Workplace. It addresses clients' current and future needs across all market sectors, including hybrid and future working models.

Infosys' managed workplace services are driven by a human-centric approach and strong consulting capabilities, leading to co-creation and innovative solutions for the modern workplace. Infosys has a global footprint and brings the appropriate expertise to the U.K..

TCS is a well-known provider of managed workplace services in the U.K. and globally. With its Cognix™ solution, it leads in providing a comprehensive suite of managed services designed to improve EX across the modern workforce.

Unisys has a solid local presence as a managed services provider in the U.K.. The company's digital workplace services portfolio is strong and continues evolving to meet future workplace demands.

Wipro is a reputable global provider with market-leading managed workplace services in the U.K. through its LiVE Workspace™ platform. It has various IP-led solutions, such as VirtuaDesk™, for leading support services.

Microland, a Rising Star, offers catalogue-based services, including commercial catalogue, device catalogue, services catalogue and their device as a service (DaaS). It is a single end-to-end management service for all end-user devices, apps and data across hybrid workplaces.

Unisys

Leader

"Unisys delivers market-leading managed workplace services through a proven combination of automation, AI and analytics to provide next-generation, modern device management across the U.K. region."

Kevin Turner

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees across 71 global offices. In FY22 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. In the U.K., Unisys has several recent wins which contribute to annual growth in global clients of 49 percent and attract increased attention from enterprise clients in more sectors. There is an increased focus on the digital workplace business unit, and the U.K. market contributes significantly to global revenues.

Strengths

Diverse clients: Unisys has almost 800 clients globally for its digital workplace solutions. The company has increased the devices under its management by 10 percent in the last year to approximately 3.8 million. Recent wins in the U.K. have highlighted the value of the transformative approach realised by the local delivery team. It focuses on transforming business value by emphasizing EX and delivering frictionless services.

Enhanced portfolio: Unisys has established a specific business unit for digital workplace services. This led to acquisitions that have strengthened its technology IP and capability to deliver improved EX to its clients. The company also keeps clients happy and supports a more than 93 percent renewal rate.

Data-driven digital workplace: Unisys service desk and support services focus on EXs aligning with business goals. Unisys offers predictive insights through its PowerSuite platform and delivers real-time insights to further improve the experience. Metrics are collected across various tools, including UCC, user profile data and endpoint telemetry. This forms the Unisys XLA 2.0 approach and differentiates the offering as the focus moves from the device to the employee.

Caution

Outcome-based contract models support Unisys' continued growth in the U.K.-managed workplace services quadrant. The company could also showcase more success stories from existing clients in the region to maintain its market position.

Managed Workplace Services – End-user Technology - Mid Market

Who Should Read This Section

This report is relevant to midmarket enterprise clients across industries in the U.K. for evaluating providers of managed workplace services — end-user technology.

In this quadrant, ISG highlights the current market positioning of the providers of managed workplace services to midmarket accounts in the U.K. and how each provider addresses the key challenges faced in the region.

In recent years, midmarket enterprises in the U.K. have faced several challenges from market uncertainty and the challenging economic outlook. These enterprises seek new opportunities to reduce operating costs and create a flexible and inclusive work environment. Midmarket enterprises in the U.K. continue to invest heavily in digital workplace services to meet their transformational needs, and look for experienced managed service providers that can transform their traditional workplaces and deliver scalable and more connected workplaces.

With the growing traction of end-user technology, enterprises in the U.K. want to offer a modern management approach by including a BYOD strategy and UX-centric workplace design.

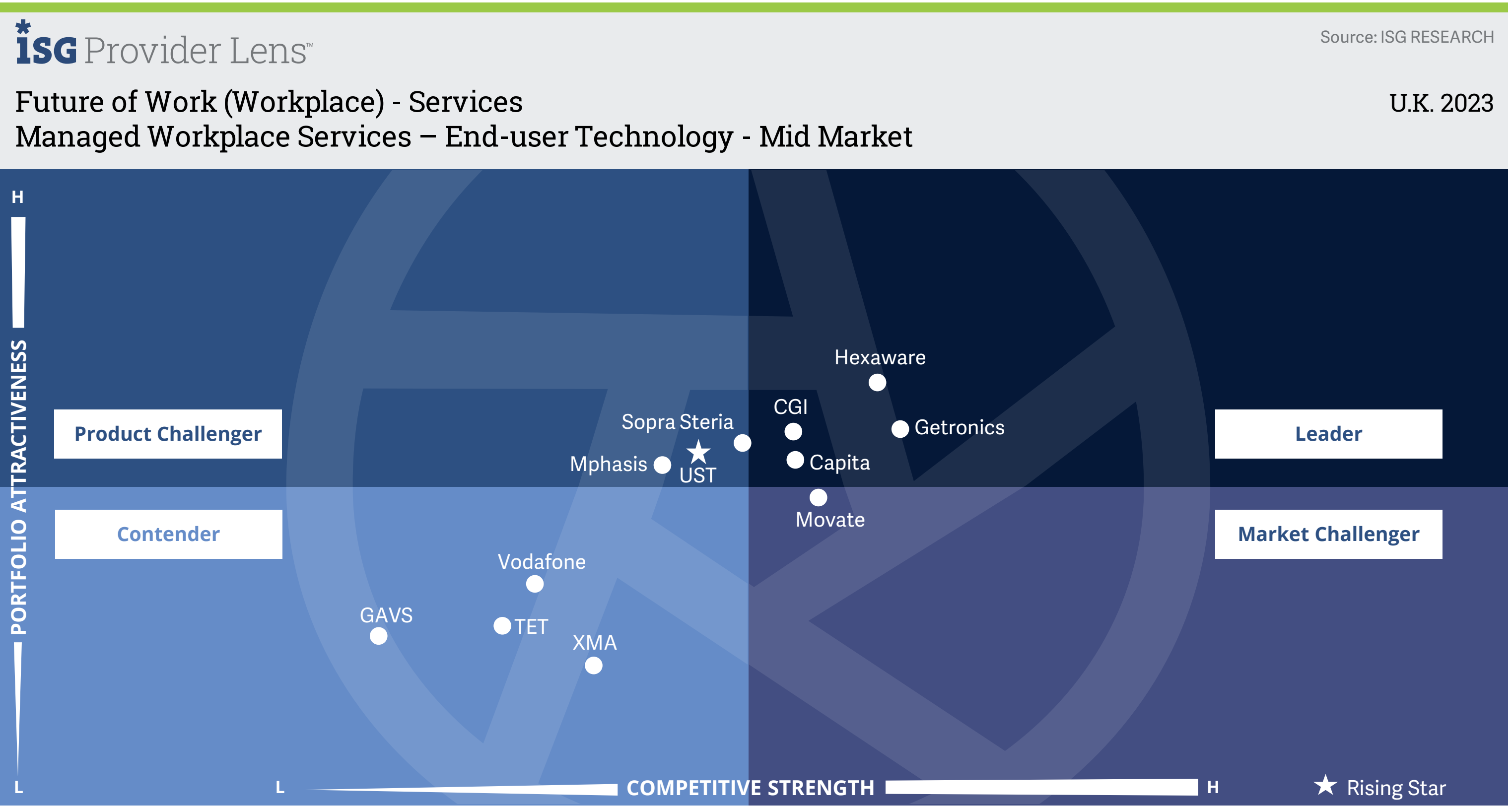
Midmarket enterprises in this region also invest in sustainability initiatives and incorporate eco-friendly practices into their workplaces to cut costs and improve employee well-being. With pricing being a major concern, midmarket enterprises in the U.K. want to engage with providers that can keep their workplace infrastructure stable, streamline their business operations and optimise their expenses.

Technology professionals should read this report to understand providers' relative positioning and abilities that can help them effectively plan and select managed digital workplace services.

Cybersecurity professionals should read this report to see how providers address the significant challenges of compliance and security while maintaining a seamless EX.

Procurement professionals should read this report to better understand the current landscape of managed workplace service providers in the U.K..

Digital professionals, including facility management leaders, should read this report to understand how managed workplace service providers fit their digital transformation initiatives.



This quadrant assesses providers that deliver managed workplace services. Providers support midmarket enterprises in **end-user technology** aspects of the digital workplace to provide business users with the **modern, hybrid workplace** demanded.

Kevin Turner

Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies that are typically deployed, provisioned and secured by enterprise IT departments for end users and employees across midmarket-sized enterprises. These managed infrastructure services in the digital workplace include end-user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in the managed services space offer complete end-user computing (EUC) technology services that form the core of the digital workplace. These include device management, patch management, device and application provisioning, virtualized desktops access, device lifecycle management, support for bring-your-own-device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and managing the entire IT infrastructure behind an EX-centric workplace design. Provisioning, managing and securing the devices remain the first basic step to enabling a digital workplace and enhancing EX. The increasing focus on EX is transforming these services to be more focused on enhancing the experience and catering to the client's respective industry. While these services are typically associated with traditional computing devices and tablets, their scope can be extended to include some industry-specific devices such as point-of-sale devices for retail and medical equipment devices for healthcare.

Eligibility Criteria

1. Provide **support for** unified endpoint management **(UEM) and mobility management**. Also, support application provisioning, patch management and enterprise mobility management
2. Provide complete **device lifecycle management services**, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling **(device-as-a-service)**. Services should cover device sourcing and logistics and device as a service for security
3. Demonstrate experience in providing **remote virtual desktop services** on-premises and on the cloud **(desktop-as-a-service)**
4. **Manage devices in the respective countries** in the study, with at least 25 percent of the devices managed outside the provider's home region
5. **Strong local presence** with a majority of workplace engagements around **EUC services**

Observations

Although many providers positioned in the Managed Digital Workplace Services — Large Accounts also cater to midmarket clients, they are omitted from this evaluation because the midmarket segment covers a small percentage of clients for them. Providers with a strong local presence and the ability to offer services in a pay-per-use or consumption-based model lead this market.

Contenders in this quadrant have strong capabilities in managed services but support only a portion or aspect of these offerings. They should focus more on capability development and increasing their market share in the U.K..

Product Challengers in this quadrant offer strong AI and automation-enabled workplace support capabilities. Some also offer decent capabilities in device management. They need to pursue the market more aggressively to increase their market share.

Market Challengers in this space have a solid local presence but lack sufficient capabilities to address the changing needs of midmarket clients.

Leaders in this quadrant offer automation and analytics-enabled capabilities, and they have a sizeable client base in the midmarket.

From the 40 companies assessed for this study, 12 qualified for this quadrant, with four being Leaders and one Rising Star.

Capita

Capita provides managed workplace services in the U.K., specifically focused on supporting clients by managing the workforce's well-being across the region's midmarket. It is committed to a seamless workplace experience providing secure access from anywhere on any device.

CGI

CGI provides managed workplace services for midmarket clients across the region. The company has a strong presence in the U.K. public sector. It is known for supporting clients in achieving social values targets and sustainability goals.

getronics

Getronics-managed digital workplace services are ideally suited to the U.K. midmarket. It offers plug-and-play industrialized solutions and a productized offering designed to benefit frontline workers in clients across the U.K..

HEXAWARE

Hexaware delivers managed workplace services through its Elite Workplace with a vision to create an immersive, collaborative, secure, EX-centric workplace ecosystem. Annual growth continues to be greater than 30 percent as the company attracts new clients.

UST

UST, a Rising Star, delivers managed workplace services in the U.K. based upon a combination of strong partners, robust IP and exceptional customer services. UST continues to attract new clients with aspirations to improve EX.

Digital Service Desk and Workplace Support Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.K. for evaluating providers of digital service desk and workplace support services.

In this quadrant, ISG highlights the current market positioning of digital service desk and workplace support service providers in the U.K. and how each provider addresses the key challenges faced there.

One of the significant challenges enterprises face in the U.K. is to keep up with the increasing IT costs and maintain service desk operations. Transforming the IT service desk remains one of the top priorities for U.K. enterprises to meet office and remote working requirements. These enterprises want to ensure end-user productivity and enhance their experience by leveraging well-equipped service desks powered by AI and other cognitive technologies. Enterprises in this region seek providers that can empower them to realise digital transformations at scale and transform their IT service desk by offering an increasing range of support services, including field services, tech bars, digital lockers and more.

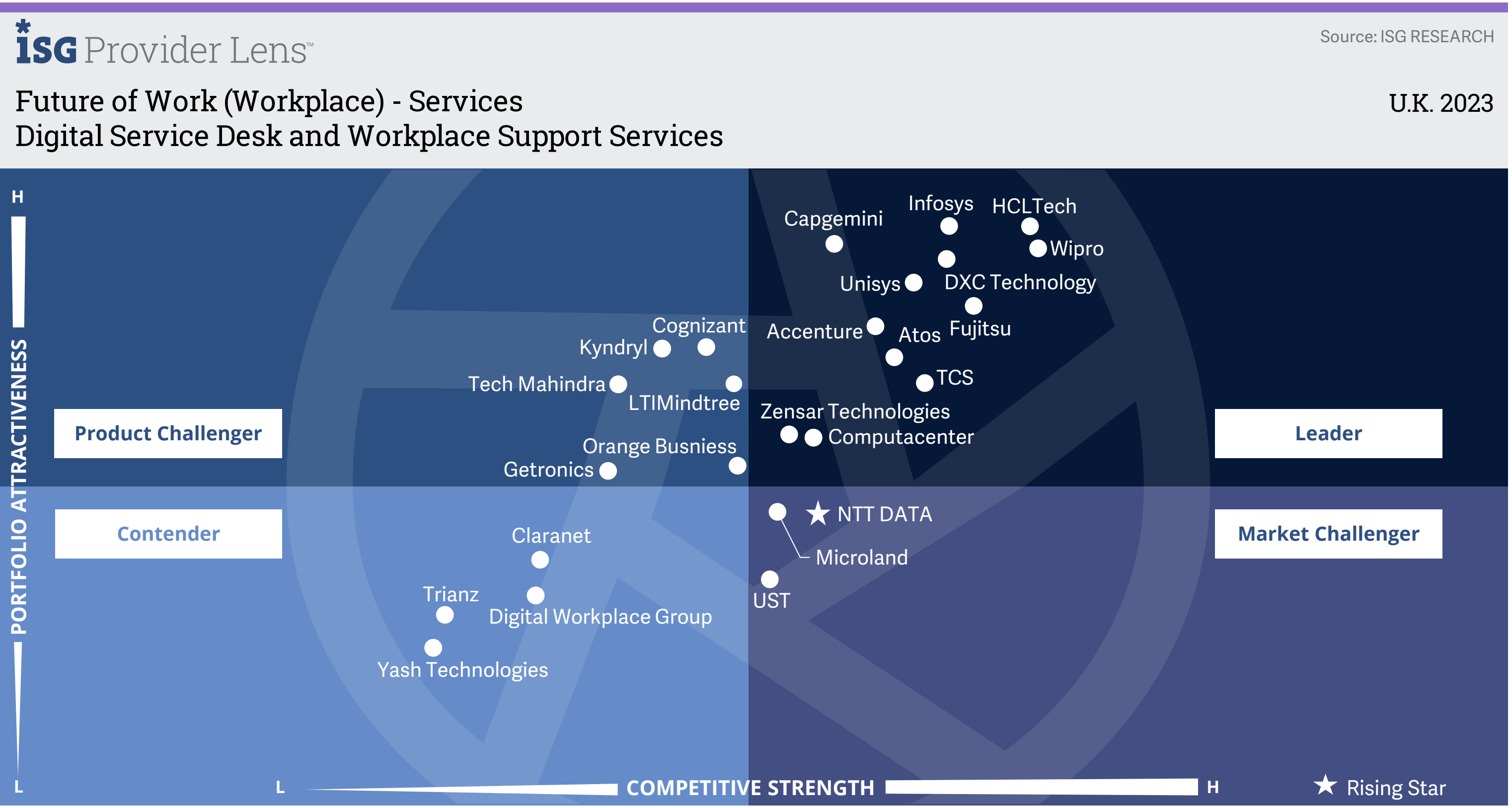
Global and U.K. enterprises face challenges in managing and monitoring tickets effectively. Hence, these enterprises seek an effective service desk solution to resolve the issues with self-help or AI-enabled virtual agents quickly. The enterprises also increasingly turn to service providers that can help them build an end-to-end service model and run proactive operations, resulting in enhanced end-user experiences.

Technology professionals, including workplace technology leaders, should read this report to understand providers that can help them modernise service desk and workplace support services.

Digital professionals, including facility managers, should read this report to understand how digital service desk and workplace support service providers fit their digital transformation initiatives.

Field service professionals should read this report to understand how service providers implement and expand the uses of workplace services to manage field service operations better.

Procurement professionals should read this report to better understand the current landscape of digital service desk and workplace support service providers in the U.K..



This quadrant assesses providers that deliver digital service desk and workplace support services. Providers support large enterprises with **service desk** skills, experience and operations to deliver the **well-operated workplace** business users demand.

Kevin Turner

Definition

This quadrant assesses service providers that offer modernized support services, including workplace support, service desk services, onsite/field support, tech bars and cafés, digital lockers, uber-style field support and automation-enabled omnichannel support for chat and voice. These services encompass automated proactive technical support and cloud platforms to offer always-on systems. The providers leverage local onsite field support and digitally transformed services through AI and other cognitive technologies for user-facing tasks and help achieve significant cost savings.

Service desk and support services are typically outsourced as part of overall managed workplace services and as standalone services. Traditionally, these services depended solely on the skills of human agents who would take call support requests. The agents' performances were tracked via service level KPIs such as average call handling time.

However, with increasing usage of automation, ML and contextual AI, support services have gone through a complete transformation with less dependent on voice and increasing support from automated chatbots, knowledge articles, peer support and implementation of the latest technologies such as augmented and virtual realities. These services also include field and onsite support that require expert technicians to visit the location of the employee to fix the devices and issues. This calls for a strong local presence via own staff or through partnerships to provide the required hands and feet support. Organizations with large office campuses also deploy services such as IT vending machines and tech bars to provide in-person support.

Eligibility Criteria

1. Provide **managed service desk and workplace support services** through both human and virtual agents
2. Offer **remote and onsite field support** plus **in-person technical assistance**, leveraging augmented reality **and/or** virtual reality (AR/VR)
3. Ability to set up and support self-help **kiosks, tech bars, IT vending machines and digital lockers.**
4. Use **data-driven enriched analytics** to support **self-service, automatically resolve tickets** and generate actionable insights.
5. Provide **automated and contextualized support** for end users based on their roles and work
6. Ability to **quantify workplace support function performance** beyond traditional service metrics
7. Have **strong local presence** with a majority of workplace engagements around support services.

Observations

In 2023, the Digital Service Desk and Workplace Support Services quadrant focuses on service desk and support, separated from the Managed Workplace Services quadrant reported in 2021. Providers offering service desk and support services portfolio are positioned in this quadrant, which includes service desk, remote and in-person support, tech kiosks and field services.

Contenders in this quadrant offer a strong managed services portfolio around the Microsoft technology ecosystem. At the same time, they should develop capabilities for further automation and integration while showcasing a better market presence with client stories and revenue.

Product Challengers have a stronger portfolio that leverages automation, AI and ML technologies plus augmented and virtual realities capabilities. These providers also have frameworks and platforms for managed services and offer ITIL management services. They should pursue the U.K. market aggressively to acquire more clients and expand their local presence.

Market Challengers offer traditional workplace support and service desk services, and they are well established in the market with large client bases. They should further develop their capabilities.

Leaders in this quadrant provide differentiated workplace support services powered by contextual AI technologies and further integration with business functions. They also have strong and growing client bases in the U.K..

From the 40 companies assessed for this study, 25 qualified for this quadrant, with 12 being Leaders and one Rising Star.

accenture

Accenture provides digital service desk and workplace support services as full next-generation capabilities. The myWizard® platform is an experience-centric offering underpinned by automation. Users benefit from improved productivity and ease of use.

Atos

Atos delivers support services via a modular portfolio to meet enterprise clients' operational, digital and people needs. Digital workplace and people experience are the primary focus, and there is a proven methodology and tools to benefit clients.

Capgemini

Capgemini is a leading service desk and support services provider across the U.K.. It delivers consistent, next-generation support services that use automation and AI to provide clients with a modern, hybrid workplace.

Computacenter

Computacenter's digital service desk and support services are well-recognised in the U.K. market and operate across many clients and market sectors. The company provides next-generation capabilities through the DigitalMe platform, which includes automation, self-healing and analytics capabilities.

DXC TECHNOLOGY

DXC Technology delivers digital support services that empower its clients to improve employees' workplace experiences. The virtual agent-led digital support capabilities include digital acceleration, engaging personalization and effectiveness.

Fujitsu uvance

Fujitsu is an established service desk and support service provider in the U.K.. It has a broad technical portfolio and, in recent years, has improved its managed services portfolio. Fujitsu leads U.K. clients towards improved EX.

HCLTech

HCLTech is a leading global provider of digital service desk and support services with a strong U.K. footprint. The services delivered with its Fluid Workplace platform are an optimum combination of its IPs, expertise and solutions.

Infosys Cortex platform delivers service desk and support services. Underpinned by analytics and automation, Infosys also utilises the platform to support clients in achieving sustainability targets while making operational savings.

TCS offers service desk and support services through its Cognix™ platform. Embedded automation and AI make the platform scalable and flexible to drive clients towards hybrid, modern working methods.

Unisys, a global provider of digital service desk and support services, has a strong U.K. presence. Leading with experience management, Unisys supports clients in their move to the hybrid workplace with an approach that benefits clients and users alike.

Wipro digital service desk and support services lead the market through LiVE Workspace™, VirtuaDesk™ and other intellectual property-led solutions. Its experience-led approach delivers value for new and existing clients in the U.K..

Zensar's digital service desk and workplace support services are provided by a strong portfolio of digital workplace services (DWS), including modern workplace, intelligent collaborations, digital workplace support and IT enablement services.

NTT DATA, a Rising Star with a strong global footprint, has established a foundation in the U.K. for service desk and support services. It continues to innovate and offers a broad range of workplace services, including consulting, transformation and operations.

Unisys

Leader

"Unisys delivers market-leading digital support services through a proven combination of automation, AI and analytics to provide the U.K.'s next-generation, omnichannel service desk solutions."

Kevin Turner

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees across 71 global offices. In FY22 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. In the U.K., Unisys has several recent wins which contribute to annual growth in global clients of 49 percent and attract increased attention from enterprise clients in additional sectors. The omnichannel support and service capabilities are especially interesting for U.K. clients.

Strengths

Data-driven digital workplace: Unisys service desk and support services focus on aligning employee experiences with business goals. Unisys offers predictive insights through its PowerSuite platform and delivers real-time insights to improve the digital experience. Metrics are collected across various tools, including UCC, user profile data and endpoint telemetry.

Consistent and omnichannel support: Through InteliServe™, Unisys offers more human-like interactions that create a better end-user experience, leading to reduced resolution time. The delivery of first contact resolution has increased to more than 90 percent, with around a third of incidents resolved through automation.

XLA 2.0: The Unisys XLA 2.0 approach differentiates the offering as the focus moves from the device to the employee. The first wave of XLA 2.0 includes measuring parameters such as precognition, device responsiveness, device stability, device performance, tech adoption (notably chatbot usage), Microsoft Teams responsiveness and unified communication as a service (UCaaS) usage.

Enhanced portfolio: Unisys has established a digital workplace services business unit. That led to acquisitions that strengthened the company's technology IP and capability to deliver improved EX to its clients. This keeps clients happy and supports the renewal rate of over 93 percent.

Caution

Outcome-based contract models support Unisys' continued growth in the U.K. Digital Service Desk and Support Services quadrant. However, its remaining traditional SLA contracts (approximately 8 percent of the total) could be transformed for completeness.

Appendix

The ISG Provider Lens™ 2023 – Future of Work (Workplace) – Services study analyses the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Future of Work (Workplace) - Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
    * Strategy & vision
    * Tech Innovation
    * Brand awareness and presence in the market
    * Sales and partner landscape
    * Breadth and depth of portfolio of services offered
    * CX and Recommendation

Lead Analyst

Kevin Turner
Principal Analyst

Kevin Turner brings more than 35 years of experience spanning digital advisory, IT sourcing, technology and industry research. He is a digital expert at ISG, responsible for authoring thought leadership papers and ISG Provider Lens™ reports around the Future of Work.

Kevin's remit includes advising senior executives on digital strategy, product planning, emerging tech and IT procurement. Kevin has authored research reports in the realm of the Future of Work and IT outsourcing.

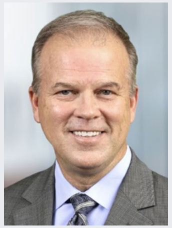
Research Analyst

Sonam Chawla
Senior Analyst

Sonam Chawla is a senior analyst at ISG, where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, Future of Work – Services and Solutions, Cybersecurity Solutions and Services. Sonam has over five years of experience in the market research industry and is skilled in secondary research, report writing and company profiling. Her areas of expertise include digital workplace, enterprise collaboration, EX services and conversational AI.

She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional and global market trends and insights. In addition, she also handles custom engagement requests from providers and advisors. Before this role, she worked as a research analyst, responsible for authoring syndicated research reports and consulting research projects.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™

SEPTEMBER, 2023

REPORT: FUTURE OF WORK (WORKPLACE) - SERVICES